Epicor Integrated Service Estimator Interface

With the interface for the Epicor® Integrated Service Estimator™ (ISE), you can import the descriptions for parts and labor, along with selling prices, labor times, and labor rates, into work orders, estimates, and vehicle service checklists created in TireMaster. You can also use the ISE to order parts from suppliers.

If you have questions about version 7.5 of Integrated Service Estimator Interface that this document doesn't answer, log an online support request (use the link at support.tiremaster.com) or call TireMaster Support at **800-891-7437**.

Contents

This document includes the following sections.

Requirements

Each computer that will be used to access the Integrated Service Estimator needs the following:

- TireMaster 9.1.0 or higher or newer
- An internet connection
- A browser

User Prerequisites

To set up and use the ISE interface Interface with TireMaster, you should already know how to perform the following tasks:

- Start work orders

- ◆ Complete invoices
- ◆ Search for inventory

For New Users

Answer the following questions before installing and setting up the ISE interface. Your responses will help you decide how to complete various interface settings.

- ◆ Do you only want to import item descriptions, prices, and labor rates from the Integrated Service Estimator into TireMaster work orders, or do you want the ability to order parts via the ISE in addition to importing information into work orders?

- ◆ If you want to order the parts that are added to work orders, do you want the orders to be placed automatically or do you want the ability to view pending orders and make changes before the orders are placed?

- ◆ Do you want the ability to associate items retrieved from the ISE with items that have been set up in TireMaster?

- ◆ Do you want TireMaster to generate receiving documents for the parts added to work orders via the Integrated Service Estimator?

- ◆ Do you want to include supplier part numbers on work orders?

   Note: On both printed work orders and on screen, this value replaces the size assigned to items in TireMaster.

- ◆ Do you want to include shop supplies on the service checklist when items are retrieved from the ISE?

For Existing Users

If you're updating from a previous version of the ISE Interface, this release includes the following changes:

- ◆ Errors are no longer generated when you try to add an item to a TireMaster quote or work order after viewing a photo of it in the ISE.

- ◆ The current date is now used when items retrieved from the ISE are added to a service checklist that was created on a previous date.

- ◆ The correct product descriptions are now used when items from the local inventory vendor are added to service checklists.

- ◆ Parts and labor specifications that include quotation marks can now be transferred to TireMaster work orders without generating errors.

- ◆ Job code inventory items that have no transactional history have been inactivated. Therefore, you will no longer see the inactive job codes on the Inventory List unless you included inactive items in your inventory searches. Job code items that were previously used in transactions will continue to have the active status.

   Note: If you stop using a job code, you have the option to inactivate its inventory item yourself.

- ◆ Job codes can be removed from TireMaster now. For more information, see "Deleting Job Codes" on page 15.

- If you're running a multi-store TireMaster system that's hosted in the ASA data center, you can define whether a site's orders should be placed with a specific vendor. For more information, see step 6b of "Setting Up Suppliers" on page 7.

Installing and Updating the ISE Interface

Installing and updating the ISE interface is a two-step process. First, do one of the following to locate the installation program:

- Access the automatically-deployed installer from the **tmapps** shared directory. For instructions, see "Accessing an Automatically-Deployed Installer" on page 3.

- Download the installer from the TireMaster Support site. For instructions, see "Downloading the ISE Interface Installer" on page 3.

Once you've located an installer, complete the installation or update. For instructions, see "Completing the ISE Interface Installation or Update" on page 4.

Accessing an Automatically-Deployed Installer

If your TireMaster system is set up to download automatically-deployed installers as part of the nightly backup process, the installer for the ISE interface is already available to you. Typically, installers are placed in the TireMaster program folder.

Note: If your installers are downloaded to a different location, go to that folder instead.

To access an automatically-deployed installer

1. Right-click ▦ and select **File Explorer** from the menu that appears.

2. In the Quick Access navigation pane, scroll to This PC.

    Note: If File Explorer opened the This PC screen instead, disregard this step.

3. Double-click the letter or icon for the drive that TireMaster is installed in. (Usually, it's the **c:** or **d:** drive.)

4. Double-click the **TireMaster**, **qdstm**, or **tmpos** program folder.

5. Double-click the **tmapps** folder, and locate the file **tmact00000000-07050000.exe**. Once you have located the installer, complete the installation or update. For instructions, see "Completing the ISE Interface Installation or Update" on page 4.

Downloading the ISE Interface Installer

The installer for the ISE interface is available for download from the TireMaster Support site. When you download the installer, save it on your TireMaster server. To log on to the TireMaster Support Site, you need your TireMaster customer number and password. If you no longer have them, log an online support request (use the link at support.tiremaster.com) or call TireMaster Support at **800-891-7437**.

To download the ISE interface installer

1. Close all applications.

2. Log on to http://support.tiremaster.com.

3. Type your customer number and password, and click **Login**. The Support Site home page appears.

4. Click **Download Programs** on the menu. The Download Center page appears.

5. In the **Update Files** listing, click the link for the ISE interface. You'll be prompted to save the file and possibly run the installation, depending on your browser.

6. Save the installer on your computer.

   Note: Downloading the installer might take several minutes, depending on the speed of your internet connection.

7. When the download is finished, click **Close**.

8. Exit the TireMaster Support site.

Once you have finished downloading the installer, you can install or update the ISE interface. For instructions, see "Completing the ISE Interface Installation or Update" on page 4.

Completing the ISE Interface Installation or Update

After you've located the installer for the ISE interface, you can complete the installation or update.

Note: Install the ISE interface on each computer that will be used to access the Integrated Service Estimator.

To complete the ISE interface installation or update

1. Close all applications on your TireMaster server, including those in the Windows® system tray (such as antivirus programs).

2. Do one of the following:

   ◆ Go to the **tmapps** directory in the TireMaster program folder. For more information, see "Accessing an Automatically-Deployed Installer" on page 3.

   ◆ Go to the directory where you saved the installer that you downloaded from the TireMaster Support site.

3. Right-click **tmact00000000-07050000.exe**, and select **Run as Administrator**. A confirmation message appears.

4. Click **Yes**. The TireMaster - Installation Program screen appears.

5. Click **OK**. The TireMaster - Search Results screen appears.

6. Select the program folder into which you want to install the ISE interface, and click **Install**.

7. Click **Finish**.

Registering the ISE Interface

When you log in to TireMaster after installing the ISE interface, you'll be prompted to register it. Registration is required to use the interface.

To register the ISE interface

1. Log in to TireMaster. The Interface Registration screen appears.

2. Select the interface you want to register, and click **Register**. At the end of the registration, a confirmation message appears.

3. Click **OK**.

Updating the Integrated Service Estimator's Settings

Before you can access and use the Integrated Service Estimator with TireMaster, a variety of settings need to be completed. The settings can also be updated once you start using the ISE.

Defining Interface Part Numbers

To enable the transfer of information from the Integrated Service Estimator to TireMaster, you need to set a pair of system controls that define the following:

◆ The part number for a labor item

◆ The part number for a noninventoriable parts item

Note: You can assign existing inventory items to these controls or you can add new items especially for this purpose. The item that's assigned to the *parts* part number control should use the option-cost costing method.

To define the interface part numbers

1. Select **Setup** > **System Controls**.

2. Click the **Inventory** tab.

3. If you're working in a multi-store environment, select **Store Controls**. Otherwise, disregard this step.

4. Define the interface part number for *labor*.

   a. Select **Interface Labor PartNo** and press **Enter**. The Custom Inventory Lookup screen appears.

   b. Search for the item you want to use as the interface labor part number.

5. Define the interface part number for *parts*.

   a. Select **Interface Parts PartNo** and press **Enter**. The Custom Inventory Lookup screen appears.

   b. Look up the item you want to use as the interface part number for parts.

6. Close the System Controls screen.

Setting ISE Work Order and Service Checklist Defaults

By setting a group of system controls, you define what happens when items are transferred from the Integrated Service Estimator to TireMaster work orders. By setting another control, you indicate whether shop supplies are included on the service checklist when items are retrieved from the ISE.

◆ **Work Orders - Epicor Auto Order:** Defines whether to automatically place an order with a supplier, when items are added to a work order. This setting is on the **Other** tab. In a multi-store environment, it's a store control.

   Note: When this control is set to Yes, the control **Work Orders - Epicor View Order** is typically set to No.

◆ **Work Orders - Epicor Create Receiving Document:** Defines whether you want TireMaster to create receiving documents for the items added to work orders via the Integrated Service Estimator. This setting is on the **Other** tab. In a multi-store environment, it's a store control.

   Tip: To save time, set this control to Yes. Enabling the control eliminates the need to manually create receiving documents for items purchased from a parts supplier, regardless of whether you use the Integrated Service Estimator to place orders.

- **Work Orders - Epicor Show Part#:** Defines whether you want to display supplier part numbers instead of item sizes on work orders (both on screen and printed). This setting is on the **Other** tab. In a multi-store environment, it's a store control.

- **Work Orders - Epicor View Order:** Defines whether you want the ability to preview a pending order and make changes before placing the order. Enabling this setting also gives you the ability to associate items retrieved from Epicor with items in TireMaster at point of sale. This setting is on the **Other** tab. In a multi-store environment, it's a store control.

  Note: If you'll never place orders via the Integrated Service Estimator, set both this control and **Work Orders - Epicor Auto Order** to No.

- **Shop Supplies Service Checklist:** Defines whether shop supplies are included on the service checklist when items are retrieved from the ISE. This setting is on the **Inventory** tab. In a multi-store environment, it's a store control.

Updating ISE Credentials

If you need to update the user name and password issued by Epicor, you can access these settings on the Epicor setup screen.

To update your ISE credentials

1. Open an existing work order. The Invoice Entry screen appears.

2. Click **Parts & Labor**. The Available Interfaces screen appears.
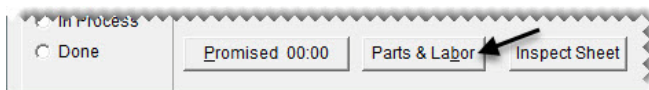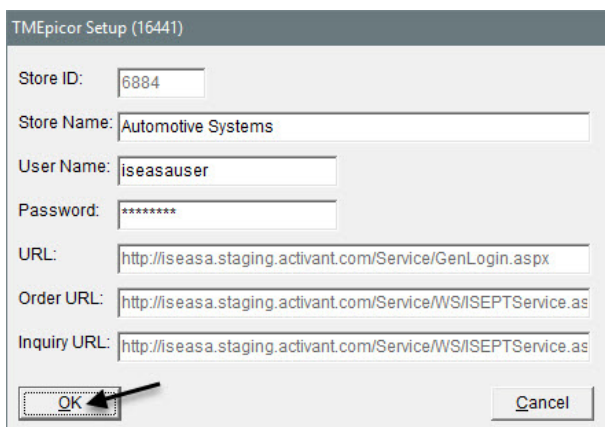
3. Select Epicor Interface and click **OK**. The TM Interface screen appears.

4. Click [×] in the upper-right corner of the screen. The TireMaster - Epicor Interface screen appears.

5. Click **Setup**.
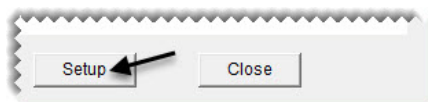
6. Type the user name and password provided by Epicor.

   Note: The user name and password entered here are also required to access the Service Dealer Profile in the ISE when you want to update your contact information or settings for selling prices, labor rates, and display options.

7. To save your changes, click **OK**.

8. Close the open screens.
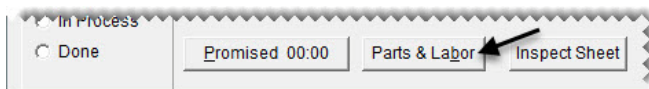
Setting Up Suppliers

Setting up suppliers establishes a connection between the Integrated Service Estimator and the vendor records for your parts suppliers in TireMaster. Completing the supplier settings also enables automated ordering via the ISE.
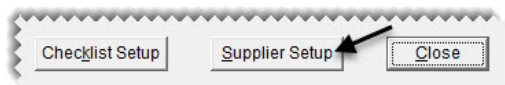
Note: If the control **Work Orders - Epicor Create Receiving Document** is enabled, TireMaster will create receiving documents for the suppliers.
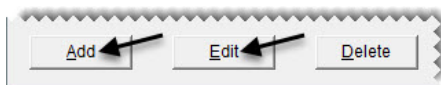
To set up suppliers

1. Open an existing work order or start a new work order.

2. Click **Parts & Labor** on the Invoice Entry screen. The Available Interfaces screen appears.
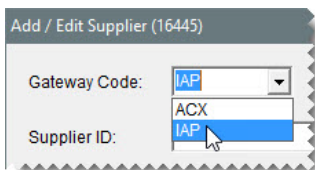
3. Select **Epicor Ordering Interface**, and click **OK**. The TireMaster - Epicor Order Interface screen appears.

4. Click **Supplier Setup**. The Supplier/Vendor Relationship screen opens.

5. To complete the settings for a new supplier, click **Add**. To update the settings for an existing supplier, click **Edit** instead.
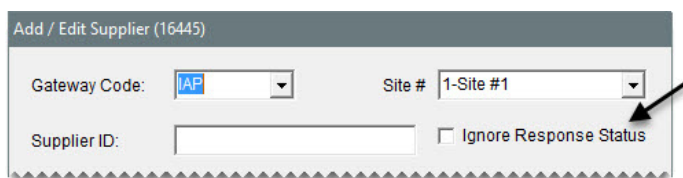
6. Enter or update the settings for the supplier.

   a. Select Epicor's gateway code for the supplier from the drop-down list.
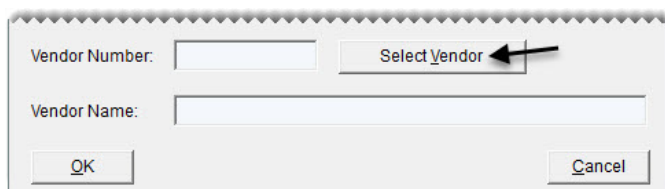
   b. If orders for a specific site should be placed with this vendor, select the site from the drop-down (optional).

      Note: This setting affects only multi-store TireMaster environments that are hosted in the ASA data center.

   c. If a supplier will locate a part for you regardless of whether it is in stock, select the **Ignore Response Status** check box. Otherwise, leave the check box alone.

   d. Type the supplier's name. The spelling used here must match the spelling used by Epicor.

      Note: The **Supplier ID** field will be filled in automatically the first time you access the ISE.

   e. Click **Select Vendor**, and look up the vendor record you want to associate with the parts supplier.

      Note: If the control **Work Orders - Epicor Create Receiving Document** is enabled, a receiving document will be created for this vendor when placing orders via the ISE.

   f. To save your changes, click **OK**.

7. Close the open screens.

Connecting the ISE and TireMaster's Service Checklist

Creating estimates with information from the ISE is possible only when there is a connection between TireMaster and the Integrated Service Estimator. This connection is established by associating the following:

- The ISE's parts and labor groups with TireMaster's service checklist inspection areas and TireMaster's inventory items

- The ISE's jobs codes with TireMaster's service checklist inspection areas

By default, these connections are established automatically when you add the Epicor Integrated Service Estimator to your TireMaster system. When the Integrated Service Estimator is installed, two new service checklists (named ISE Checklist and ISEJOBS Checklist) are added to TireMaster.

Figure 1: ISE Checklists Added to TireMaster

The names of the inspection areas for the new ISE checklist match the names of the parts and labor groups used by the Integrated Service Estimator. Similarly, the names of the inspection areas for the ISEJOBS checklist match the job descriptions used by the ISE (Figure 2).

Figure 2: Inspection Areas for the ISE Checklists

The inspection areas from the new ISE Checklist are automatically associated with the corresponding ISE parts and labor group names. Likewise, the inspection areas from the new ISEJOBS Checklist are automatically associated with the corresponding ISE job descriptions.

Figure 3: Inspection Areas and the Corresponding ISE Groups and Jobs

The other type of setting needed to connect TireMaster and the ISE is also completed automatically. When the Integrated Service Estimator is installed, inventory items from TireMaster are associated with the ISE's parts and labor groups. By default, the associated items are the ones that have been assigned to the interface part number settings in System Controls (Figure 4). For more information, see "Defining Interface Part Numbers" on page 5.

Figure 4: Items Automatically Associated with ISE Groups

You can use the automatically-generated settings for parts and labor groups, or you can manually associate inspection areas from another checklist, different items, or both with the ISE's parts and labor groups. For more information, see "Associating Inspection Areas and Items with ISE Groups" on page 10.

Jobs can also be handled in a similar manner. You can use the automatically-generated settings for jobs, or you can manually associate inspection areas from another checklist with the jobs used by the . For more information, see "Associating Inspection Areas and ISE Job Codes" on page 12.

Figure 5: Inspection Areas Manually Associated with ISE Parts Groups and ISE Jobs

Associating Inspection Areas and Items with ISE Groups

You can associate service checklist inspection areas and inventory items in TireMaster with the parts and labor groups used by the ISE.
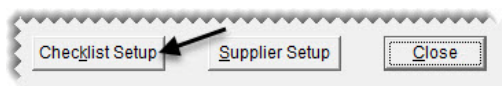
To associate inspection areas and items with ISE groups

1. Open an existing work order.

2. On the Invoice Entry screen, click **Parts & Labor**. The Available Interfaces screen opens.
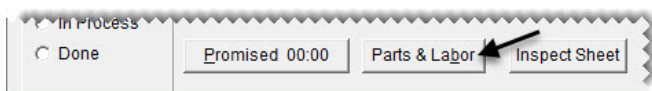
3. Select Epicor Ordering Interface, and click **OK**. The TireMaster - Epicor Order Interface screen appears.

4. Click **Checklist Setup**. The TireMaster - Epicor Job Setup screen opens.

5. Click **Group Setup**. The TireMaster - Epicor Group Setup screen opens.

6. Update the inspection areas and items associated with ISE parts groups as needed.

   a. To associate an inspection area with an ISE parts group, click in the **Inspection Area** column and press $\boxed{\sim}$. Then select an inspection area from the list, and click **OK**.

   b. To associate an item with an ISE parts group, click in the **Product Code** column, and press $\boxed{\sim}$. Then look up the item you want to associate. Instructions for looking up items are available in the TireMaster help system and user guide.

   Note: Items associated with ISE parts groups need to use the option-cost costing method.

   c. Repeat steps 6a and 6b, as needed.

7. Update the inspection areas and items associated with ISE labor groups, as needed.

   a. To associate an inspection area with an ISE labor group, click in the **Inspection Area** column and press $\boxed{\sim}$. Then select an inspection area from the list, and click **OK**.

b. To associate an item with an ISE labor group, click in the **Product Code** column. Then look up the item you want to associate.

ID	Group Description	Inspection Area	Product Code	
7	TURBO	TURBO	MiscLab	M
8	ALTERNATOR	ALTERNATOR	MiscLab	M
9	STARTER	STARTER	MiscLab	M

LABOR:

c. Repeat steps 7a and 7b, as needed.

8. Click **Save**.

9. Close the open screens.

Associating Inspection Areas and ISE Job Codes

You can associate service checklist inspection areas used in TireMaster with job codes from the ISE.

To associate inspection areas and ISE job codes

1. Open an existing work order. The Invoice Entry screen appears.

2. Click **Parts & Labor**. The Available Interfaces screen appears.
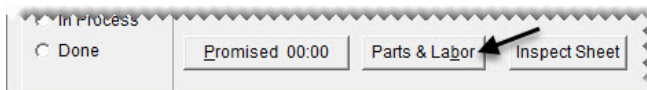
3. Select Epicor Ordering Interface, and click **OK**. The TireMaster - Epicor Order Interface screen appears.

4. Click **Checklist Setup**. The TireMaster - Epicor Job Setup screen appears.
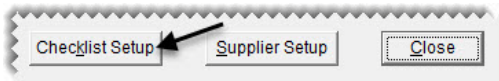
5. Click **Associated Job Codes**. The TireMaster - Epicor Job Code to Inspection Area Relationship screen appears.

6. Associate inspection areas with job codes, as needed.

a. Click in the inspection area column for a job code, and press ⌄ . The TireMaster - Epicor Inspection Areas screen appears.

TireMaster - Epicor Job Code to Inspection Area Relationship (16439)

Job Code	Inspection Area	Job Descr	^
BFBC	Front Brake Job Complete	Front Brake Job Complete	
BFBH	Front Brake Hoses	Front Brake Hoses	
BFDBS	Basic Front Disc Brake Se	Basic Front Disc Brake Service	

b. Select a checklist from the **Checklist Name** drop-down.

c. Select the inspection area you want to associate with the job code, and click **OK**.

d. Repeat steps 6a through 6c as needed.

7. If you want to use the ISE job codes as inspection areas on the service checklist, make sure the **Use These Job Codes for Inspection Areas** check box is selected.

Note: When this check box is selected, the parts and labor for an ISE job code are grouped together (in the same inspection area) on the service checklist. When the check box is clear, the ISE's parts and labor group names are used as inspection areas on the checklist instead.

8. Click **Save**.

9. Close the open screens.

Setting Up the Quick Jobs Menu

The quick jobs menu is a screen that lists up to 28 commonly-performed jobs. You can define which jobs are included on the quick jobs menu.

When Integrated Service Estimator is installed, more than 400 jobs are added to TireMaster. These jobs are set up in inventory as noninventoriable items. In the ISE, jobs are identified by codes that are one to five characters long. In TireMaster, these codes are automatically entered in the **Product Code**, **Size**, and **Quick Look** fields on the Inventory Maintenance screen.
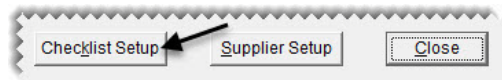
To set up the quick jobs menu

1. Open an existing work order. The Invoice Entry screen appears.

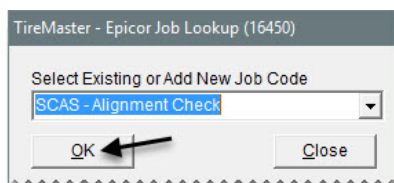2. Click **Parts & Labor**. The Available Interfaces screen appears.
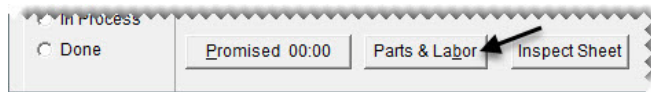
3. Select Epicor Ordering Interface, and click **OK**. The TireMaster - Epicor Order Interface screen appears.

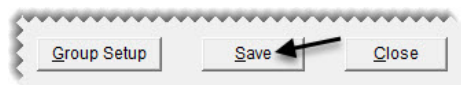4. Click **Checklist Setup**. The TireMaster - Epicor Job Setup screen appears.

5. Assign jobs to the menu or change the jobs assigned to the menu.

   a. Click the row for a job, and press ⌄. The TireMaster - Epicor Job Lookup screen appears.
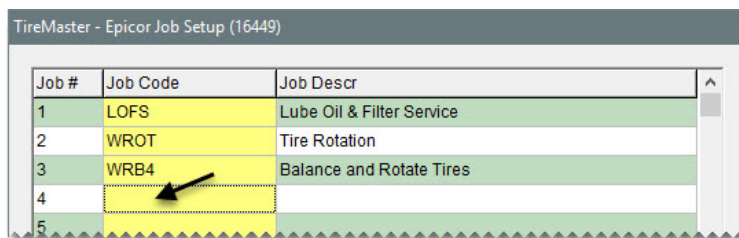
   b. Select a job from the drop-down, and click **OK**.

   c. To assign remaining jobs, repeat steps 5a and 5b.

6. Click **Save**.

7. Close the open screens.

Adding Job Codes

When Epicor introduces new job codes, you can add them to your TireMaster system. Adding job codes ensures they can be associated with service checklist inspection areas and assigned to the quick jobs menu.

To add a job code

1. Open the screen for setting up Epicor jobs.

   a. Open an existing work order, and click **Parts & Labor**.

b. Select Epicor Ordering Interface and click **OK**. The TireMaster - Epicor Order Interface screen appears.

   c. Click **Checklist Setup**.

2. Click one of the fields in the **Job Code** column and press ⌐. The TireMaster - Epicor Job Lookup screen appears.
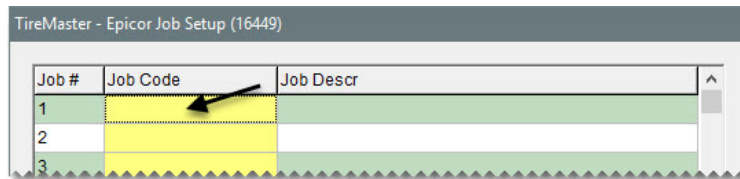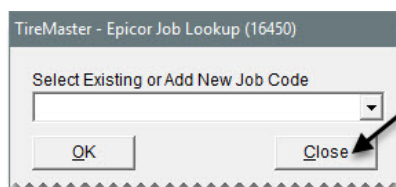

   Note: You can click any field, regardless of whether a code has been entered in it.

3. Type the job code, its name, and description.

4. Click **Add**.
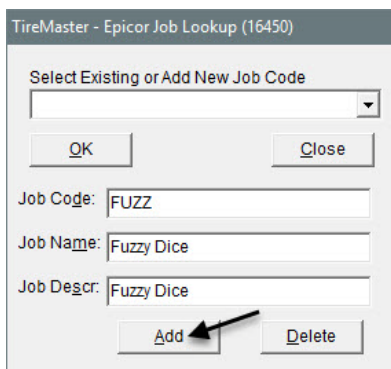
5. Close the TireMaster - Epicor Job Lookup screen, and all other open screens.

   Once a job code has been added, it can be associated with a service checklist inspection area and assigned to the quick jobs menu. For more information, see "Associating Inspection Areas and ISE Job Codes" on page 12 and "Setting Up the Quick Jobs Menu" on page 13.

Deleting Job Codes

When Epicor discontinues job codes, you can remove them from TireMaster. Once a job code is deleted, it is no longer available on the screen used to establish a relationship between the ISE and the TireMaster service checklist.

To delete a job code

1. Open the Epicor Job Setup screen.

   a. Open an existing work order, and click **Parts & Labor**.

b. Select Epicor Ordering Interface and click **OK**. The TireMaster - Epicor Order Interface screen appears.

  c. Click **Checklist Setup**.

2. Click one of the fields in the **Job Code** column and press ⌁. The TireMaster - Epicor Job Lookup screen appears.
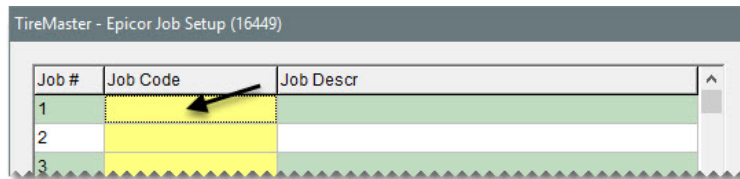
3. Type the code you want to delete in the **Job Code** field.

4. Click **Delete**. A confirmation message appears.
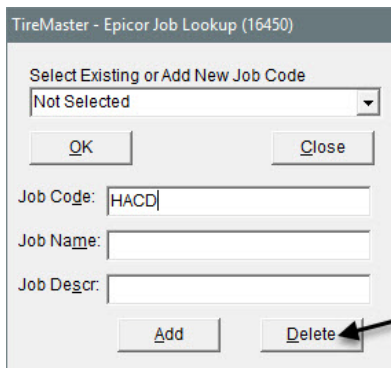
5. Click **Yes**.

6. Close the open screens.

Using the Integrated Service Estimator Interface

With the ISE interface, you can add parts and labor to work orders and estimates and access vehicle service and repair information.

Updating Work Orders with the ISE

You can create detailed work orders by importing labor times, labor descriptions, parts descriptions, and suggested retail prices from the Integrated Service Estimator into TireMaster.

Note: To perform this task, you should already know how to use the internet and start work orders in TireMaster.

To update a work order with the Integrated Service Estimator

1. Start a work order or open an existing work order. The Invoice Entry screen appears. Information about starting work orders is available in the TireMaster help system and user guide.
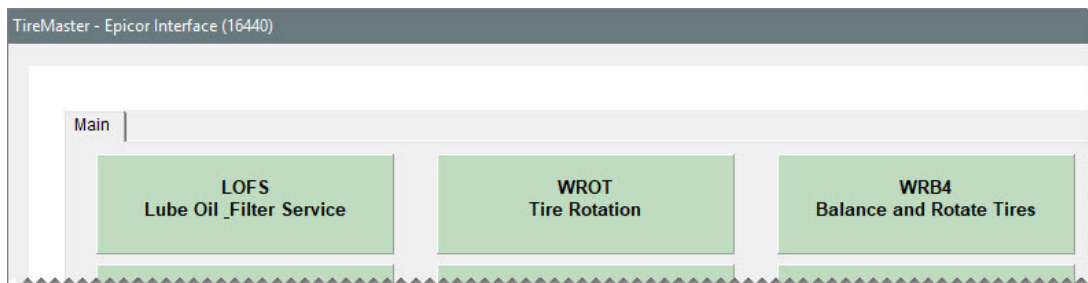
2. Open the ISE using one of the following methods:

   ◆ Click **Parts & Labor** on the Invoice Entry screen. Then make sure Epicor Interface is selected on the list that appears, and click **OK**.
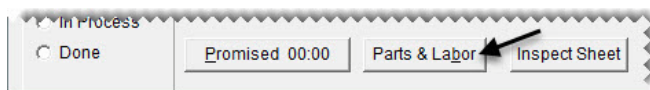
   ◆ Press **F11** to open the Quick Jobs menu. Then click the button for the type of service or repair that will be performed.

   The TM Interface screen appears.

3. Identify the vehicle, using one of the following methods. If a valid VIN was entered for the vehicle in TireMaster, the ISE bypasses the vehicle selection screen.

   ◆ Select **Use VIN,** type the vehicle identification number, and click **Go**. Then click **Next**.

     Note: Typing the VIN in the ISE does not update the vehicle record in TireMaster.

   ◆ Select **Use Manual Vehicle**. Then click **Next**.

   ◆ Select **Use Activant Vehicle**, and choose the vehicle year, make, model, and engine. Then click **Next**.

4. Look up the parts, labor, or both that are needed for the service or repair. If you launched the ISE with the Quick Jobs menu, disregard this step.

   a. Click the **Jobs**, **Parts**, **Labor**, or **SI Plus** (service intervals) tab.

   b. Depending on which tab you clicked, do one of the following to look up parts and labor:

   ◆ Type a description or code in the search field and click 🔍. Then select a job, parts, or labor from the search results. If you searched by jobs, you can look up information about similar repairs.
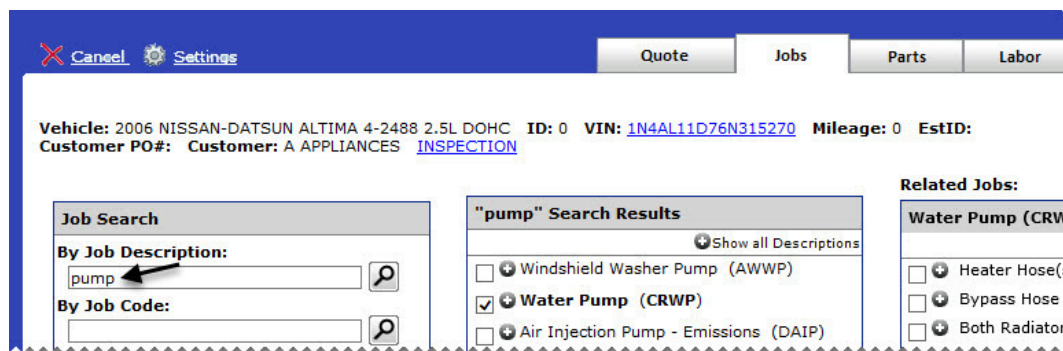
◆ Select a system or a category. Then select one or more jobs, parts, labor, groups, or intervals.


5. Click **Next**.

6. If the ISE prompts you for additional information, answer the questions and click **Next**.

7. Change the supplier, if needed.

Note: If you want to order parts from another vendor, select a different supplier from the **Current Supplier** drop-down. To see whether your inventory includes items that can be used to complete the service or repair, select Local Inventory from the drop-down instead. (Available only if local inventory has been set up for you.) For more information, see "Local Inventory" on page 29 and "Associating ISE Items with TireMaster Items" on page 21.

8. Select the parts and labor you want to add to the work order. If you cannot see the individual parts and labor items, click the plus signs to expand the listings.
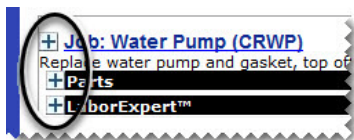
9. Click **Transfer & Exit**.
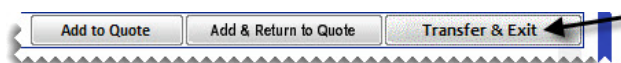
> **Note:** If you want to look up additional parts and labor in the ISE before returning to TireMaster, click **Add to Quote** or **Add & Return to Quote** instead.

Depending on how the interface is set up, one of the following happens:

◆ The selected items, along with their costs, are added to the work order in TireMaster. (To see an item's cost, select the item and click **Option Cost** on the Invoice Entry screen.) If automatic ordering is enabled, an order is also placed with the supplier via the Integrated Service Estimator.

> **Note:** If the cost for an item is not available from Epicor, TireMaster reminds you to enter the cost by turning the item's line pink. Information about entering an item's option cost is available in the TireMaster help system and user guide.

◆ The TireMaster - Epicor Order Interface screen appears. You can order items via the Integrated Service Estimator (click **Order**), or you can close the screen and place the order later. The items are then added to the work order.

> **Note:** If the receiving document control is enabled and there is already an open receiving document for the supplier, TireMaster prompts you to add the items to the existing receiving document when you place the order. For more information, see "Setting ISE Work Order and Service Checklist Defaults" on page 5.

10. To exit the work order, click **Quit**.

Creating Estimates with the ISE

You can create detailed estimates in TireMaster by importing parts and labor, selling prices, labor times, and labor rates from the Integrated Service Estimator into the service checklist section of the Quote and Estimate Writer.
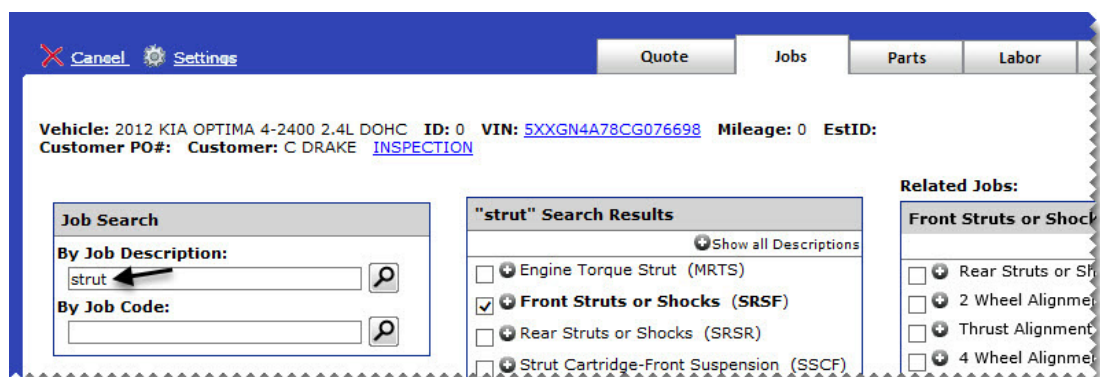
To update a service checklist with the ISE

1. If you haven't already, start a new estimate or open an existing estimate. Information about creating and retrieving estimates is available in the TireMaster help system and user guide.

2. On the Quote and Estimate Writer screen, click **Parts & Labor**. The Available Interfaces screen appears.
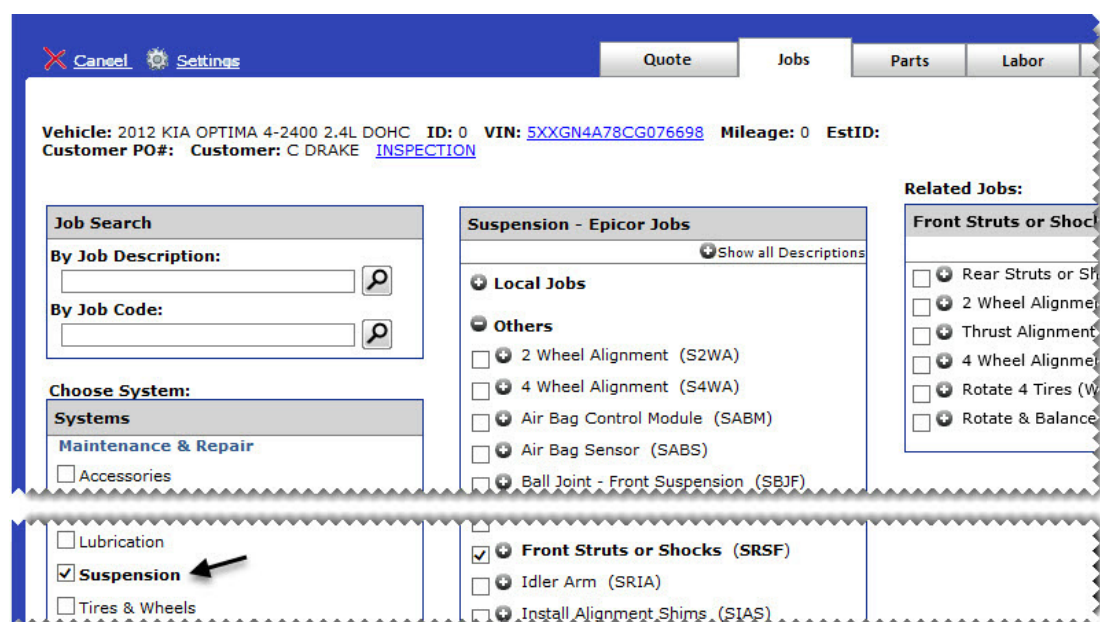

3. Select Epicor Interface, and click **OK**. The TireMaster - Epicor Interface screen appears.

4. Identify the vehicle, using one of the following methods. If a valid VIN was entered for the vehicle in TireMaster, the ISE bypasses the vehicle selection screen.

   ◆ Select **Use VIN,** type the vehicle identification number, and click **Go**. Then click **Next**.

     Note: Typing the VIN in the ISE does not update the vehicle record in TireMaster.

   ◆ Select **Use Manual Vehicle**. Then click **Next**.

   ◆ Select **Use Activant Vehicle**, and choose the vehicle year, make, model, and engine. Then click **Next**.

5. Look up the parts, labor, or both that are needed for the service or repair.

   a. Click the **Jobs**, **Parts**, **Labor**, or **SI Plus** tab.

   b. Depending on which tab you clicked, do one of the following to look up parts and labor:

   ◆ Type a description or code in the search field and click 🔍. Then select a job, parts, or labor from the search results. If you searched by jobs, you can click the **Show Related Jobs** link to look up information about similar repairs.

   ◆ Select a system or a category. Then select one or more jobs, parts, labor, groups, or intervals.
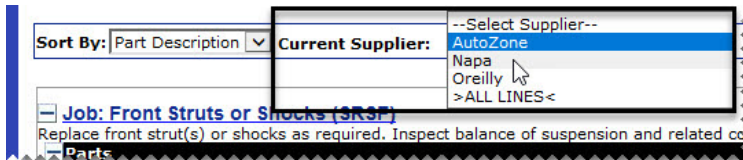
c. Click **Next**.
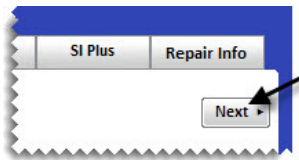
6. If the ISE prompts you for additional information, answer the questions and click **Next**.

7. Change the supplier, if needed.

Note: If you want to order parts from another vendor, select a different supplier from the **Current Supplier** drop-down. To see whether your inventory includes items that can be used to complete the service or repair, select Local Inventory from the drop-down. (Available only if local inventory has been set up for you. For more information, see "Associating ISE Items with TireMaster Items" on page 21.)

8. Select the parts and labor you want to add to the service checklist. If you cannot see the individual parts and labor items, click the plus signs to expand the listings.

9. Click **Transfer & Exit**. The items retrieved from the Integrated Service Estimator are added to the service checklist panel on the Quote and Estimate Writer screen.
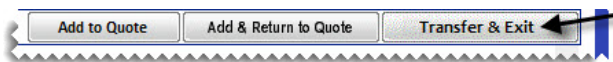
Note: If you want to look up additional parts and labor in the ISE before returning to TireMaster, click **Add to Quote** or **Add & Return to Quote** instead.

10. Save the estimate.
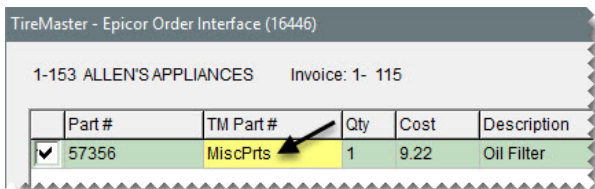

Associating ISE Items with TireMaster Items

If you realize that an item you've retrieved from the Integrated Service Estimator is one you regularly keep in stock, you can associate the two items. Associating a retrieved item with an item in TireMaster helps you maintain accurate counts, cost, and history for that item.

To associate ISE items with TireMaster items

1. Open the TireMaster - Epicor Order Interface screen.

   Note: When the control **Work Orders - Epicor View Order** is set to Yes, this screen opens automatically when transferring items from the ISE to a work order. To access this screen from an existing work order, click **Parts & Labor**, select Epicor Ordering Interface, and click **OK**.
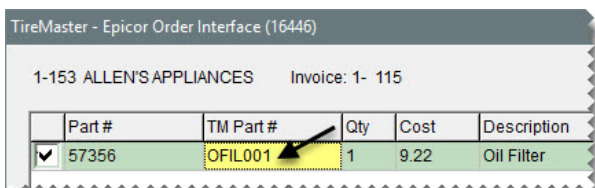
2. For each retrieved item you want to associate with a TireMaster item, do the following:

   a. Click in the **TM Part #** field for the retrieved item you want to associate, and press ⌒. The Custom Inventory Lookup screen appears.

   Note: The item retrieved from the ISE uses the interface part number that was assigned in system controls. For more information, see "Setting ISE Work Order and Service Checklist Defaults" on page 5.

   b. Look up the TireMaster item. The interface part number is replaced with the part number for the item you just looked up in TireMaster.

   Note: When you associate two items, the TireMaster part number will be used for future work orders. Once an association is established, it can be changed but it cannot be removed.

3. Order the items or click **Close**. The items are added to the work order. For more information, see "Ordering Items Via the Integrated Service Estimator" on page 22.

   Note: When items from TireMaster and the ISE are associated, the prices assigned in TireMaster are used for the work order instead of the selling prices from the ISE.

4. Complete the invoice.

   Note: When items are associated, the cost assigned in TireMaster posts to the general ledger instead of the cost listed in the Integrated Service Estimator.

## Ordering Items Via the Integrated Service Estimator

With manual ordering via the Integrated Service Estimator, you can order items when you add them to a work order or you can wait until later to order items that have already been put on a work order.

To order items via the Integrated Service Estimator

1. Open the existing work order for which you want to order items.

2. Click **Parts & Labor** on the Invoice Entry screen. The Available Interfaces screen appears.
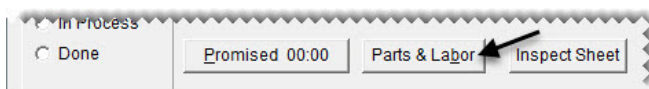
3. Select Epicor Ordering Interface, and click **OK**. The screen lists all of the pending items for an order. For items that aren't in stock, the supplier's name is highlighted in yellow and the status is Not Found.

Ext. Description	Status	GatewaySellerName
Front Ceramic Pads	Found	autozone2_AutoZone
Front Disc Brake Rotor	Found	autozone2_AutoZone
Front Disc Hardware Kit	NotFound	autozone2_AutoZone

As of Date: 7/19/2018 1:24:04 PM

4. If an item was not found, you can see if it's available from another supplier.

   a. In the **GateWaySellerName** column, click the supplier's name and press $\boxed{\sim}$. Then select a different supplier from the list that appears and click **OK**. The status changes to No Status.

   b. Click **Inquire**. If the new supplier has the item in stock, the status changes to Found. If the new supplier doesn't have the item, the status returns to Not Found.

   Note: To successfully locate an item, both the original supplier and the new supplier must use the same part number for an item.

   Tip: The date and time of the last inquiry are listed in the upper-right corner of the screen.

As of Date: 7/19/2018 1:24:04 PM
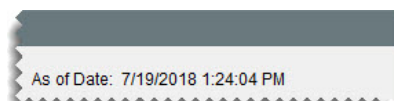
5. If you want to exclude an item from the order, clear its check box.

TireMaster - Epicor Order Interface (16446)

1-153 ALLEN'S APPLIANCES   Invoice: 1- 115

	Part #	TM Part #	Qty	Cost	Description
✓	DG815A	MiscPrts	1	28.99	Brake Pads, Front
✓	31375DG	MiscPrts	2	43.99	Brake Rotor, Front
☐	H6090	MiscPrts	1	0.00	Brake Hardware Kit, Front

   Note: If you want to delete the entire order instead, make sure the check boxes for all of the items are selected and click **Clear**.

6. When you're ready to place the order, click **Order**. Depending on the status of the items on the order, the order is placed automatically or TireMaster prompts you to continue although one or more of the items on the order are not available.

> **Note:** If the receiving document control is enabled and there is already an open receiving document for the supplier, TireMaster prompts you to add the items to the existing receiving document. For more information, see "Setting ISE Work Order and Service Checklist Defaults" on page 5.

7. To close the open work order, click **Quit**.

> **Note:** If the receiving document control is enabled, you can verify that a receiving document was created for the order. Click **PO List**, click the **Receiving Documents** tab, and select the status of **Open**. To view the receiving document, select it and click **Edit**.

Generating Vehicle Inspection Sheets

You can generate vehicle inspection sheets from the Integrated Service Estimator. Each sheet includes the vehicle year, make, model, and engine; VIN and mileage; and customer name and phone number. When the VIN is included in the TireMaster vehicle settings or if the VIN is entered in the ISE's vehicle selection screen, the inspection sheet also includes specific vehicle service information, such as fluid specifications and the recommended thickness for brake linings.

To generate a vehicle inspection sheet

1. Open the Integrated Service Estimator using one of the following methods:

   ◆ On the Invoice Entry screen (a customer's work order), click **Inspect Sheet**.
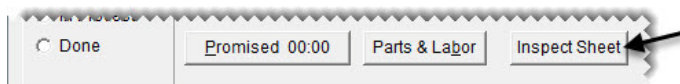
   ◆ On the main TireMaster screen, press **F6**. When the vehicle screen opens, type the VIN or choose the year, make, model, and engine, and click **Next**. Then click **Inspection** at the top of the screen.
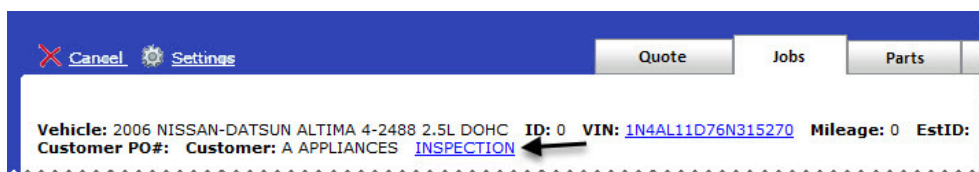
2. Click the printer icon in the upper-right corner of the on-screen inspection sheet. The Windows Print screen opens.

3. Select a printer and click **Print**.

4. Click ⊗ to close the on-screen inspection sheet. A confirmation message appears.Click **OK** to close the message.
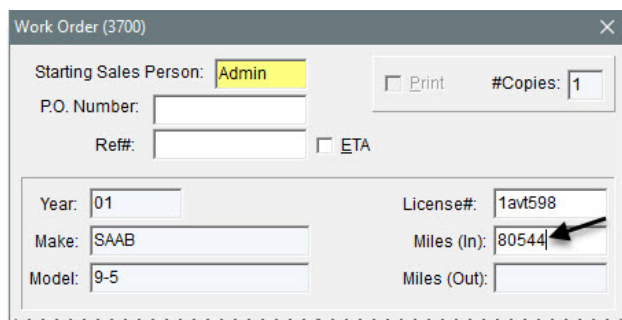
5. Close the TM Interface screen.

Printing Service Interval Information

You can generate a list of manufacturer-recommended services based on a vehicle's mileage when you start a work order.

To print service interval information

1. Start a work order, and type the vehicle's mileage in the **Miles (In)** field on the Work Order screen.
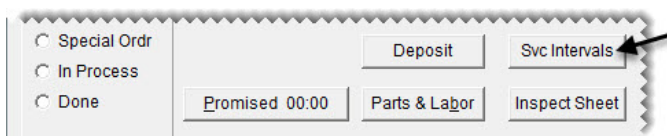
2. When the Invoice Entry screen appears, click **Svc Intervals**. The TM Interface screen appears.
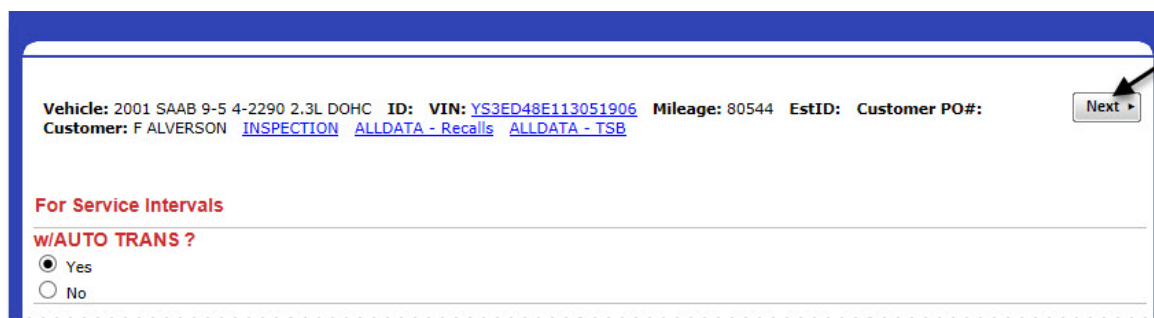
3. Answer questions about the vehicle, if any, and click **Next**. The interval information sheet opens.

4. Click the printer icon in the upper-right corner of the on-screen interval sheet. The Windows Print screen opens.

5. Select a printer and click **Print**.

6. Click ⊗ to close the on-screen interval sheet. A confirmation message appears.

Retrieving Parts and Labor for Service Intervals

The Integrated Service Estimator includes service interval information for normal, severe, and premium maintenance services. You can look up the parts and labor needed for a particular interval in the ISE and add the items to a customer's estimate or invoice.

To retrieve service interval information

1. Open the Integrated Service Estimator.

    a. From the Invoice Entry screen (a customer's work order) or the Quote and Estimate Writer, click **Parts & Labor**.

    b. Make sure Epicor Interface is selected and click **OK**.

2. Identify the vehicle, using one of the following methods. If a valid VIN was entered for the vehicle in TireMaster, the ISE bypasses the vehicle selection screen.

    ◆ Select **Use VIN,** type the vehicle identification number, and click **Go**. Then click **Next**.

      Note: Typing the VIN in the ISE does not update the vehicle record in TireMaster.

    ◆ Select **Use Manual Vehicle**. Then click **Next**.

    ◆ Select **Use Activant Vehicle**, and choose the vehicle year, make, model, and engine. Then click **Next**.

3. Click the **SI Plus** tab.
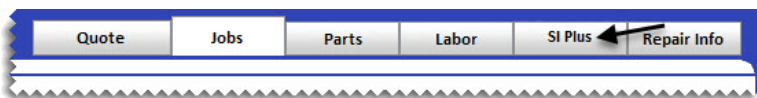
4. Define an interval type and the mileage.

    a. Select the type of driving conditions from the drop-down.
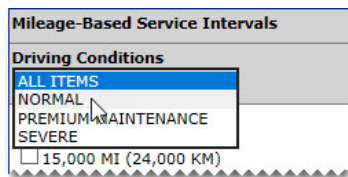
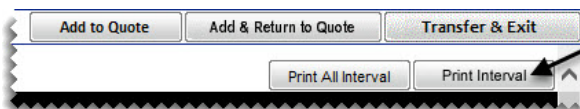   b. Select the check box for the service interval that's closest to the vehicle's mileage.
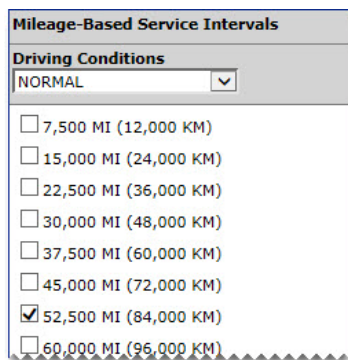
5. Select any indicators and additional services as needed. Then answer the questions for the specific conditions.

6. Click **Next**.

7. Print a copy of the services recommended for the interval (optional).

    a. Click **Print Interval**. An on-screen copy of the interval appears.

    b. Click the printer icon in the upper-right corner of the on-screen interval sheet. The Windows Print screen opens.

    c. Select a printer and click **Print**.

8. Click ⊗ to close the on-screen interval sheet. A confirmation message appears.Select the parts and labor for the interval.

    a. If the parts and labor listings are collapsed, click the plus sign next to the job description.

    b. Select the check boxes for the parts needed for the interval service.

c. Select the check box for performing the interval service. The check boxes for individual labor items included in the service are selected automatically. If you want to exclude individual labor items from the work order, clear the check boxes.

9. To move the items to the work order or estimate, click **Transfer & Exit**.

Retrieving Mitchell 1 Service and Repair Information

If you've subscribed to Mitchell 1® ProDemand®, you can retrieve service bulletins and repair information from the ISE without starting a work order.

To retrieve service and repair information

1. Press **F6**. The TM Interface screen appears.

2. Identify the vehicle, using one of the following options:
   - Select **Use VIN,** type the vehicle identification number, and click **Go**. Then click **Next**.
   - Select **Use Manual Vehicle**. Then click **Next**.
   - Select **Use Activant Vehicle**, and choose the vehicle year, make, model, and engine. Then click **Next**.

3. Click the **Repair Info** tab. Mitchell 1 ProDemand opens in a web browser.

4. If you're prompted to log in, enter the credentials that Mitchell1 issued to you.

5. Search for the service bulletin or repair information that you need on the ProDemand web site.

6. Print the service bulletin or repair information as needed.

7. Close the browser window for Mitchell 1 ProDemand and the open TireMaster interface screen.

Retrieving ALLDATA Information

ALLDATA subscribers have the option to retrieve recall notices, service bulletins, diagrams, diagnostic trouble codes, and vehicle component information from the ISE without starting a work order.

Note: If you want to use this feature, contact Epicor support and have your ALLDATA credentials available.

To retrieve ALLDATA recall notices and technical service bulletins

1. Press **F6**. The TM Interface screen appears.

2. Identify the vehicle, using one of the following options:

    ◆ Select **Use VIN,** type the vehicle identification number, and click **Go**. Then click **Next**.
    ◆ Select **Use Manual Vehicle**. Then click **Next**.
    ◆ Select **Use Activant Vehicle**, and choose the vehicle year, make, model, and engine. Then click **Next**.

3. Do one of the following:

    ◆ To open the ALLDATA home screen, click the **Repair Info** tab.

    ◆ To go directly to a list of recalls or technical bulletins, click the **ALLDATA - Recalls** or the **ALLDATA - TSB** link.
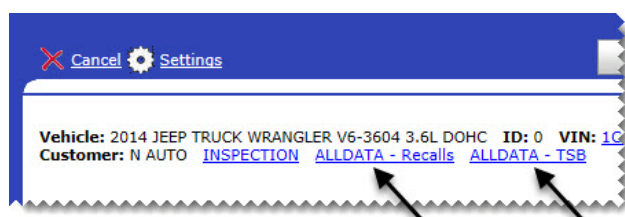
4. Click the link for the document you want to review.

5. For a hard copy, click 🖨.

6. To return to TireMaster, click ⊠ and then click **Close**.

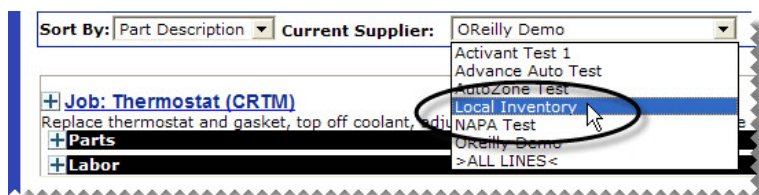# Local Inventory

If your inventory includes parts (such as oil filters or brakes pads) that you regularly keep in stock, you'll typically want to use the items that you have on hand for services and repairs instead of ordering them from your suppliers. Using local inventory makes it possible for you to see whether you have the items needed for a job directly from the ISE.

Viewing Local Inventory from the ISE

With local inventory, you can see whether your inventory includes the parts needed for a service or repair directly from the ISE. If a compatible part is in stock, you can then add it to the work order or service checklist via the ISE.

To view your inventory in the Integrated Service Estimator, select Local Inventory from the **Current Supplier** drop-down. If there are no compatible parts in your inventory, then you can see whether they're available from another supplier instead.

Figure 6: Selecting Local Inventory
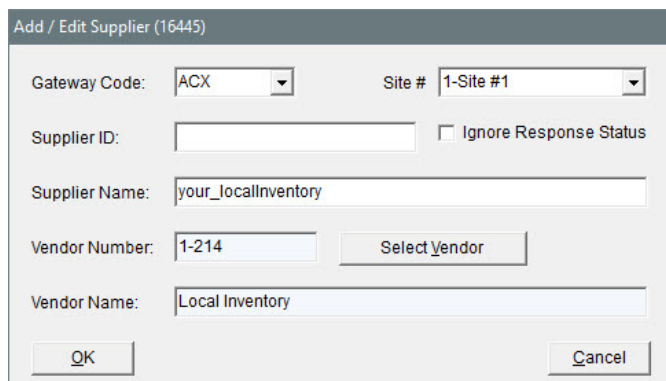
Adding Local Inventory

If you don't have access to local inventory from the ISE and would like to would like to add it, contact your ASA sales representative. If you plan to use local inventory, set up a vendor in TireMaster called Local Inventory.
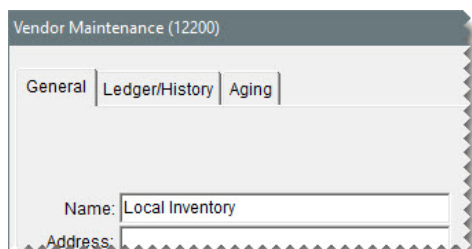
Figure 7: Vendor Record for Local Inventory

This vendor will be assigned to the supplier setups for local inventory.

Figure 8: Local Inventory Vendor Assigned to the Local Inventory Setup